LPL Financial

LPL Financial Kicks Off Annual Advisor Conference in Boston

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BOSTON, July 27, 2015 (GLOBE NEWSWIRE) -- LPL Financial LLC, the nation's largest independent broker-dealer*, a custodian for registered investment advisors (RIAs), and a wholly owned subsidiary of LPL Financial Holdings Inc. (NASDAQ:LPLA), today announced that more than 7,000 independent financial advisors, home office staff and guests are expected to attend Focus 2015, the firm's annual meeting of independent professionals from across the country from July 26 to 29 in Boston.

Focus 2015 marks its 25th year as a premier gathering of industry professionals, bringing together LPL-affiliated advisors and bank and credit union program managers, along with their staff and guests. LPL product sponsor firms and LPL employees also attend and participate in the conference.

"This year's record-breaking conference attendance reflects the continuing appeal of the independent model," said Mark Casady, LPL Financial chairman and CEO. "Focus provides us with an ideal opportunity to engage with our clients and further demonstrate the power of their affiliation with LPL."

Conference attendees will hear valuable insights from top LPL executives, including: Casady, President Dan Arnold, Chief Investment Officer Burt White and Chief Information Officer Victor Fetter, as well as several invited keynote speakers. Attendees are also invited to attend panel discussions and breakout sessions covering a range of topics, including: technology and tools, practice management, succession planning and research, as well as to participate in networking sessions with colleagues and engage with more than 100 sponsors in the exhibitor hall. Conference registration is open to all LPL-affiliated independent financial advisors as well as institutions supported by LPL's institution services platform.

New additions to this year's conference include:

- **Focus 2015 app**: A new mobile application, created specifically for the conference, will further empower attendees to network and connect via social media and will provide conference details at their fingertips.
- **More technology training**: LPL will be offering hands-on technology training sessions pre- and post-conference, and select advisors will also offer peer training.
- **Focus Idea Exchange**: New this year, LPL will be facilitating a series of peer-to-peer discussions through the Idea Exchange area of the conference. Advisors are invited to drop by the Idea Exchange to engage in topical discussions on a variety of subjects, from succession planning to growing their practices. The two sponsors of the Idea Exchange - Oppenheimer Funds and Resource Real Estate - will also be holding sessions targeted at guests of advisor attendees, including one for teens on saving money for college.

Daily conference highlights include:

- **Monday, July 27:** In addition to opening remarks from Mark Casady and Dan Arnold, Sir Richard Branson, founder and chairman of the Virgin empire, will deliver a keynote address at the general session.
- **Tuesday, July 28:** The morning general session will feature remarks from Victor Fetter, LPL chief information officer, and a keynote address from Dr. Ben Bernanke, former chairman of the board of governors of the Federal Reserve System. Boston Marathon bombing survivors and national heroes Heather Abbott and Jeff Bauman will headline the afternoon general session, moderated by Boston news anchor Lisa Hughes.
- **Wednesday, July 29:** The morning's general session will be led by Burt White, LPL chief investment officer, and Dr. Ronan Tynan, an Irish Tenor, will be the keynote speaker.
- **Daily Research Briefings at 7:15 a.m**.: Members of the LPL Research team will provide conference attendees with a live morning research update.

In addition, attendees were invited to participate in pre-conference events on Sunday, July 26, including:

- **Focus on Women Advisors Forum** - Nearly 200 women advisors attended the forum to share best practices, develop leadership skills and discuss the industry from their perspective. The keynote speaker was Diana Nyad, an author, journalist, motivational speaker and renowned long-distance swimmer.
- **LPL Financial Foundation Advisor Volunteer Event:** Advisors, their guests and LPL executives volunteered to create murals to be donated to two Boston charitable organizations, City Year and Boys and Girls Clubs of Boston. The event, held at the Boston Convention and Exhibition Center, was organized to support the mission of the LPL Financial Foundation to help underserved individuals achieve their life's aspirations.

*Based on total revenues, Financial Planning magazine, June 1996-2015

About LPL Financial

LPL Financial, a wholly owned subsidiary of LPL Financial Holdings Inc. (NASDAQ:LPLA), is a leader in the financial advice market and serves $485 billion in retail assets. The Company provides proprietary technology, comprehensive clearing and compliance services, practice management programs and training, and independent research to more than 14,000 independent financial advisors and more than 700 banks and credit unions. LPL Financial is the nation's largest independent broker-dealer since 1996 (based on total revenues, Financial Planning magazine, June 1996-2015), is one of the fastest growing RIA custodians with $105 billion in retail assets served, and acts as an independent consultant to over an estimated 40,000 retirement plans with an estimated $120 billion in retirement plan assets served, as of March 31, 2015. In addition, LPL Financial supports approximately 4,300 financial advisors licensed with insurance companies by providing customized clearing, advisory platforms, and technology solutions. LPL Financial and its affiliates have 3,352 employees with primary offices in Boston, Charlotte, and San Diego. For more information, please visit www.lpl.com.

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